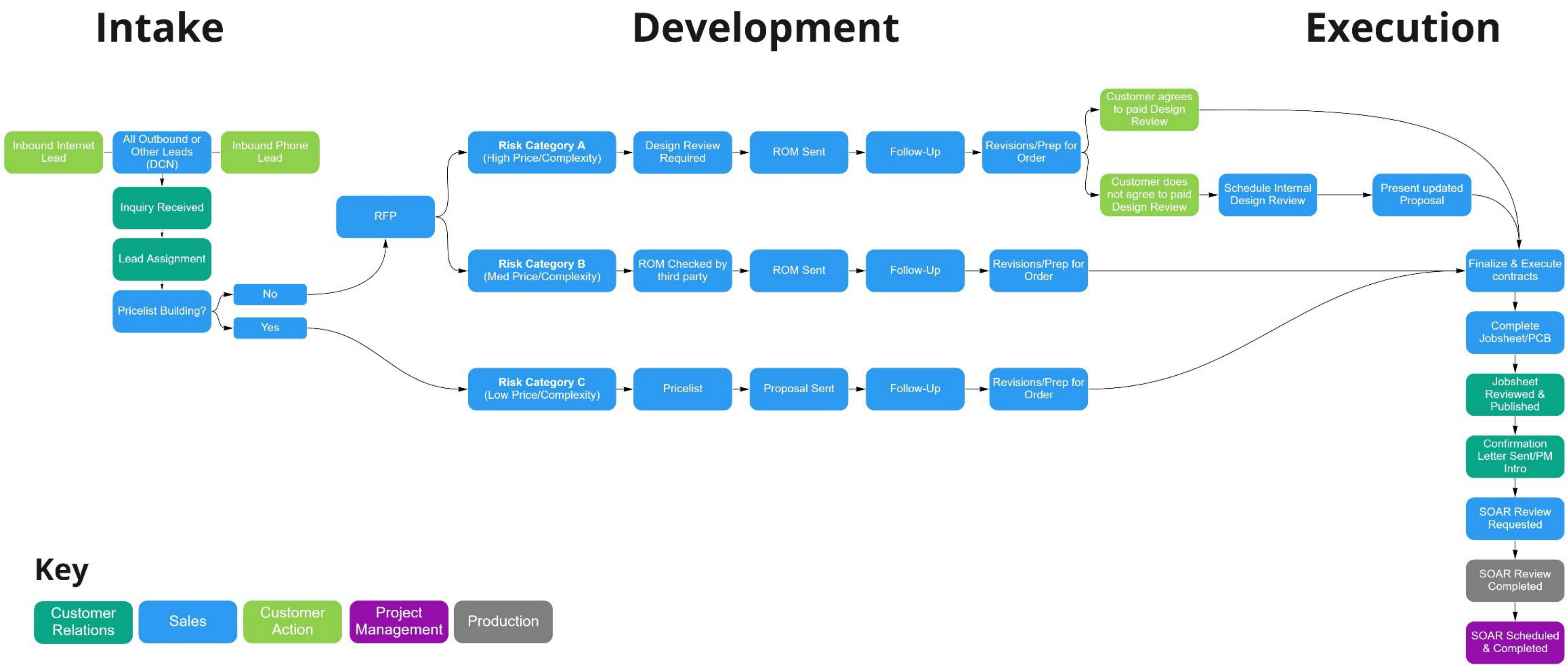
5. Updated Sales Order Process (Outline)

The updated Sales Order Process consists of three stages: Intake / Development / Execution



a.) Intake

1. Inquiry Received:

All Inbound Phone, Internet, and "Other" leads will be classified in Hubspot as "Inquiry Received".

2. Lead Assignment:

All inquiries will be assigned via updated Lead Management. See Section 6 of this document.

b.) Development

1. Identify if Pricelist building (Risk Category C):

If YES: Requested building falls within our Pricelist*, salesperson will skip RFP (Request for Pricing) and proceed straight to ____ Pricelist* pricing to develop quote.

If NO: Requested building does not fall within our Pricelist*, salesperson will proceed to RFP (Request for Pricing).

**Pricelist may only be used without an RFP if the Pricelist is considered up to date by VP of Sales.*

2. RFP:

Salesperson is to complete RFP form via Hubspot and save in Project Folder. A Hubspot task is to be created and assigned to Glen Jackson to complete cost sheet for structure price within a reasonable amount of time.

3. ROM Development & Distribution:

Salesperson must initiate a new quote number within the Rubb Toolbox (example: 1234-22CTM). Salesperson is to send customer the prepared rough order of magnitude using the most updated PandaDoc quotation template.

4. Identify Risk Category:

Salesperson is to identify the internal project risk category based on the following criteria:

Risk Category A:

- From Estimator's price sheet, estimated # of design hours > 1,000, OR
- From Estimator's price sheet, structure price > $1,000,000

Risk Category B:

- From Estimator's price sheet, estimated # of design hours < 1,000, and is not considered a Pricelist building.

Risk Category C:

- Pricelist building

5. Order Acceptance

Salesperson is to follow up and revise quote until customer is prepared to proceed with order.

c.) Execution

1. Finalize Project Details via Revisions (Design Review, if necessary)

Any alterations to the original quote are to be labeled as Rev1, Rev2, etc. If necessary, initiate Design Review and proceed with Design Review payment schedule for highly custom projects.

2. Execute Contracts & Establish Payment Schedule

Salesperson is to ensure all contracts (either Rubb or Others) are reviewed and completed upon reaching an agreement with customer on all project details, lead time, pricing, and payment schedule.

3. Complete New Jobsheet and create New Job Folder

Salesperson is to complete and save Jobsheet which will associate the next available job number automatically, upon save. Jobsheet must then be reviewed, signed & published by salesperson and Customer Relations Manager. Once published, ALL revisions will be labeled as Rev1, Rev2, etc. If the revision alters revenue, 'R' will be added (example: Rev1R). Salesperson is to create a New Job Folder in J Drive, adding the appropriate template folders. The most recent and agreed upon quote, contracts, PO's are to be saved in the appropriate sub folder within the Job Folder.

4. Request Confirmation Letter from Customer Relations

Salesperson is to request a Confirmation Letter be sent to the customer (via note in HubSpot) from Customer Relations.

5. Complete Project Cost Budget

Salesperson is to ensure the Project Cost Budget is completed and signed by all necessary parties. Once complete, both the updated budget excel, and scanned PDF should be saved and stored in the appropriate Job Folder (Project Budget & Cost Sheets). All cost sheets used for budget are to be stored in same folder.

6. Request SOAR Review & apply comments (Sales Order Action Review)

Salesperson is to request a SOAR Review to be completed by Senior Draftsman, Arni Reim (via note in Hubspot). Once received, salesperson is responsible for adding comments and answers to SOAR Review in red text. Once complete, SOAR Review (with comments) is to be saved in the Sales Information sub folder of the Job Folder.

7. Request SOAR Handoff meeting to be scheduled by PM

Salesperson is to request a SOAR meeting to be scheduled by Director of PM, via task in Hubspot. Salesperson is to attend SOAR and provide as much information/context as possible to satisfy any questions or concerns brought forward in SOAR. Any tasks developed in SOAR are to be entered & assigned in Hubspot.

6. Updated Lead Management

a.) Inbound Leads

Inbound Phone Leads:
When a customer calls and opts for Sales, this is to ring Karli Gagne & Jim Chadbourne only. Jim & Karli will work together to ensure all customer information is updated and stored within HubSpot and labeled as a 'New Inquiry'. Karli will proceed with Lead Assignment.

Inbound Internet Leads:
When a customer submits our "Contact Us" form on our website, this form is to automatically generate a 'New Inquiry' in HubSpot to alert Customer Relations. Customer Relations will proceed with Lead Assignment.

ALL other orders that require Jobsheets:
Special requests from DCN (Cocoon/Aeroclave/Other) are sent to Karli Gagne and labeled as 'New Inquiry'. Karli will proceed with Lead Assignment or Self-Assignment (ex. Para Port). Assigned Rubb salesperson will serve as Job Co-Agent and will coordinate with DCN, production and PM to complete handoff.

b.) Outbound Leads

Sales:
Salesperson is to follow up with their owned accounts at his/her discretion, updating account status as needed. If a new opportunity is found, salesperson simply enters a 'New Inquiry'. Lead Assignment is only necessary if inquiry is under new entity name/referral.

Customer Relations:
To improve customer service & generate business, Customer Relations will initiate new contact via phone & email. The initial purpose is to serve as an updated point of contact. If service/warranty/sales work is uncovered, Customer Relations agent will serve as co-agent on job budget (comp will be determined on a per-job basis). If an active Rubb salesperson is already conducting visible follow up, Customer Relations will not initiate contact.

c.) Lead Assignment

Existing/Prior Customers:
If a documented quote has been sent to a customer from an active Rubb salesperson within 36 months, they are to remain the salesperson. Customer Relations is to assign account ownership within HubSpot. Every effort will be made to retain the same salesperson for each account to build & improve customer relations.

Note: GC's (Consigli, CIANBRO, etc.) are not to be held/owned exclusively by an individual salesperson. If one active Rubb salesperson has a documented quote on a specific project, they own the right to work with any other inquiry regarding that project.

d.) New Accounts

All inbound inquiries will be classified in HubSpot as S / M / L based on estimated square footage of requested building. Regardless of market type or building use, inbound phone & internet leads will be distributed automatically and on a rotational basis.

- Regardless of inquiry size, all CT inquiries will be assigned to Sean H and all ME inquiries will be assigned to Coby M.
- Exceptions to this rotation are made only if the account is discovered to be an existing account of another active Rubb salesperson OR by direct request from senior management.
- ALL dispute resolution handled by Dave Nickerson or Joe Hyatt.

Small Inquiry	Medium Inquiry	Large Inquiry
< 10,000 SF	10,001 - 30,000 SF	> 30,000 SF